

**Objectives of this questionnaire:** Enable project teams (immediate and extended) to be cognizant of the disparate planning activities that can affect project outcome. Provide early notification to the stakeholders that a new project may involve their area, and information to help plan resource estimates and identify risks.

## **PROJECT PLANNING QUESTIONNAIRE**

**Project managers:** Please complete and distribute this questionnaire to all project stakeholders (e.g., system owners, users, computer operations, telecommunications, LAN engineering, training, security, standards, documentation); see last page of questionnaire for additional guidance on developing a distribution list. Provide as many answers as are possible at this time; the questionnaire is not designed to capture detailed requirements. Consider using this questionnaire as a basis for a project startup meeting.

*If the project is not started immediately after the questionnaire is distributed, redistribute at project startup to provide current information. All areas should be notified of the project well in advance of scheduling the first formal checkpoint, e.g., the Planning Phase Exit, as defined in the SOM Systems Development Lifecycle.*

**Recipients of the questionnaire:** Please review as soon as possible and provide feedback as appropriate to the project manager.

### **PROJECT PROFILE**

Project Name & Acronym \_\_\_\_\_

Contract No. \_\_\_\_\_

Project No. \_\_\_\_\_

Is there separate funding for this project? \_\_\_\_\_

Yes \_\_\_\_\_

No \_\_\_\_\_

Agency User Organization \_\_\_\_\_ POC \_\_\_\_\_  
Program Manager, Technical Manager)

(e.g.,

e-mail address \_\_\_\_\_ Phone \_\_\_\_\_

Project Manager & organization \_\_\_\_\_

(The person who has daily responsibility for planning, tracking, and controlling the project))

e-mail address \_\_\_\_\_ Phone \_\_\_\_\_

**Project Profile** (continued)

**A.** Are measurable business objectives documented as goals for this project?

Name & Date of document

Provide a brief description of what this project will accomplish. (i.e. the project objectives)

**B.** What size effort (e.g., as defined by the SDLC) do you anticipate this project to be?

Small \_\_\_\_\_ Medium \_\_\_\_\_ Large

**C.** Where are the users located? (check all that apply and/or fill-in information)

\_\_\_\_ Agency      \_\_\_\_ Operations Office      \_\_\_\_ Field Office  
\_\_\_\_ Area Office      \_\_\_\_ Laboratory      \_\_\_\_ Local Office

Name of Agency site, laboratory, university, or collaborative partnership (e.g., between a laboratory or university of the US and that of another country)

Other

**D.** List any known assumptions, constraints, and dependencies associated with this project.

**E.** List any known risks associated with this project.

## PROJECT INFORMATION

For each question, check all that apply, and supply specific information where requested.

1. This project involves: (check all that apply)

- |  |  |
|--|--|
| <input type="checkbox"/> System Development              | <input type="checkbox"/> System Maintenance        |
| <input type="checkbox"/> Software Development            | <input type="checkbox"/> Software Maintenance      |
| <input type="checkbox"/> Commercial Off the Shelf (COTS) | <input type="checkbox"/> Infrastructure Upgrade(s) |
| <input type="checkbox"/> Customization (of COTS)         | <input type="checkbox"/> Major System Enhancement  |

Other

2. Platform - Software: (check all that apply)

- ☐ Client-Server      ☐ Distributed    ☐ Stand Alone    ☐ Web Enabled

Other

3. Platform - Hardware: (check all that apply)

- ☐ Mainframe    ☐ Desktop Computer    ☐ Dedicated Server    ☐ Shared Server

Other

4. Infrastructure - the target-computing environment: (check all that apply)

- |                                    |   |                                    |   |
|------------------------------------|---|------------------------------------|---|
| <input type="checkbox"/> Backbone  | <input type="checkbox"/> Organizational LAN | <input type="checkbox"/> Mainframe | <input type="checkbox"/> Organizational WAN |
| <input type="checkbox"/> State WAN |   | <input type="checkbox"/> Other     |   |

Name of WAN/LAN/Server (if known)

5. Network Topology.

- ☐ Ethernet      ☐ Token Ring      ☐ ATM

Other

**Project Information** (continued)

**6.** Communications Protocol.

☐ TCP/IP (Unix,NT) ☐ IPX/SPX (Novell) ☐ NetBios (IBM)  
☐ Vines (Banyan Vines)

Other

**7.** Network environment required to support the application.

☐ Peer ☐ Single server ☐ Multi server ☐ Enterprise

Other

**8.** The following are examples of current information systems technology, and not an exhaustive list. Please fill-in your particular technology if it does not appear. (check all that apply)

<input type="checkbox"/> Data Mining	<input type="checkbox"/> Data Warehouse
<input type="checkbox"/> Workgroup Computing	<input type="checkbox"/> Network Management
<input type="checkbox"/> e-mail / Voice-Mail	<input type="checkbox"/> Remote Access
<input type="checkbox"/> Distributed Application Architecture	<input type="checkbox"/> Distributed Video Conferencing
<input type="checkbox"/> Push Desktop	<input type="checkbox"/> Smart Card
<input type="checkbox"/> Wireless Communications	<input type="checkbox"/> Modular Software Components
<input type="checkbox"/> 3 Tier Model Architecture	<input type="checkbox"/> Internet Access and Support
<input type="checkbox"/> _____	
<input type="checkbox"/> _____	
<input type="checkbox"/> _____	

**9. Infrastructure Impact Assessment - Local Backbone** (fill-in requested information on the first line and check all that apply)

Hours of operation \_\_\_\_\_ Number of simultaneous users \_\_\_\_\_

☐ Connectivity exists to all identified users  
☐ Encryption required for all Messages/Packets/Transactions

The following are associated with Transporting Description:

<input type="checkbox"/> Text only	<input type="checkbox"/> Graphics only	<input type="checkbox"/> Text and graphics
<input type="checkbox"/> Multimedia	<input type="checkbox"/> Voice	<input type="checkbox"/> Video
<input type="checkbox"/> Transaction oriented	<input type="checkbox"/> File oriented	

**Project Information** (continued)

**10. Infrastructure Impact Assessment - Wide-Area Backbone**

(fill-in requested information on the first line and check all that apply)

Hours of operation \_\_\_\_\_ Number of simultaneous users \_\_\_\_\_

☐ Connectivity exists to all identified users

☐ Encryption required for all Messages/Packets/Transactions

The following are associated with Transporting Description:

☐ Text only ☐ Graphics only ☐ Text and graphics

☐ Multimedia ☐ Voice ☐ Video

☐ Transaction oriented ☐ File oriented

**11. Operating Environment(s):** (check all that apply and fill-the version and release number) V=Version  
R=Release

☐ MS Windows, V.R \_\_\_\_\_ ☐ OS/2, V.R \_\_\_\_\_ ☐ Unix/AIX, V.R \_\_\_\_\_

☐ Windows N/T, V.R \_\_\_\_\_ ☐ VM, V.R \_\_\_\_\_ ☐ Macintosh, V.R \_\_\_\_\_

☐ Novell, V.R \_\_\_\_\_ ☐ MVS, V.R \_\_\_\_\_ ☐ CICS, V.R \_\_\_\_\_

☐ DOS, V.R \_\_\_\_\_ ☐ Sun, V.R \_\_\_\_\_

☐ Web Browser (specify) \_\_\_\_\_, V.R \_\_\_\_\_

Other \_\_\_\_\_ V.R \_\_\_\_\_

**11a. The following constraints exist in the targeted operating environment(s)** (check all that apply)

☐ Firewalls ☐ Transmission speed ☐ Server capacity

☐ Security ☐ Workstation capacity ☐ Remote access capability

☐ Widely dispersed user community without appropriate inter-operability

Other \_\_\_\_\_

**12. Identify the programming languages you will be, or are considering using:** (check all that apply and fill-in the version and release number) V=Version R=Release

☐ Cobol, V.R \_\_\_\_\_ ☐ Java, V.R \_\_\_\_\_ ☐ C++, V.R \_\_\_\_\_

☐ Visual Basic, V.R \_\_\_\_\_ ☐ FoxPro, V.R \_\_\_\_\_ ☐ Paradox, V.R \_\_\_\_\_

☐ HTML, V.R \_\_\_\_\_ ☐ Delphi, V.R \_\_\_\_\_ ☐ Visual C++, V.R \_\_\_\_\_

☐ Power Builder, V.R \_\_\_\_\_

Other \_\_\_\_\_, V.R \_\_\_\_\_

**Project Information** (continued)

**13.** What is the sensitivity of the project's data?

☐ Classified ☐ Unclassified Sensitive ☐ Unclassified Non-Sensitive

**13a.** Which protective means are required ? (check all that apply)

☐ Firewall ☐ Encryption ☐ Token ☐ Digital Signature  
☐ User controlled ID and password ☐ Removable hard drive  
☐ User ID & Password, controlled by system administrator ☐ PKI  
☐ Physical Security ☐ Read/write access, controlled by system administrator

Other

**14.** List the database management systems you will be, or are considering using.

☐ Oracle ☐ Sybase ☐ MS Access ☐ SQL Server

Other

**15.** If this is a Agency-wide system, who is going to own the function for the agency data administration? (e.g. J. Doe, Chief Financial Officer; S. White, Chief Information Officer)

Name & Function/Position

**16.** Is the system or application's operation so essential that data must be immediately available at all times or recoverable within a short time frame?

☐ No ☐ Yes

If you answered yes, have you considered requirements for: (check all that apply)

☐ Data recovery ☐ Backups ☐ Fault Tolerance  
☐ System Performance ☐ Mirroring/Imaging  
☐ Disaster Recovery (crisis management)

**Project Information** (continued)

17. List existing systems, applications, or data sources, if any, with which this system will interface (sharing data, receiving data from, or sending data to).

System/Application

System/Data Source

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**PROJECT MANAGEMENT FACTORS**

Answers to the following questions will help provide a better understanding of how information systems project management practices are implemented within the Department.

18. Which lifecycle methodology will be followed on this project?

\_\_\_ SOM Systems Development Lifecycle (SDLC) \_\_\_ James Martin  
\_\_\_ Microsoft Solutions Framework \_\_\_ SDM/70

Other

19. The Software Engineering Institute's (SEI) Software Capability Maturity Model<sup>1</sup> (CMM) identifies the relative maturity of software development/maintenance organizations. The CMM level for your organization is:

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5  
\_\_\_ No evaluation has been performed.

20. Which of the following software development/maintenance techniques (if any) do you plan to use? (check all that apply)

\_\_\_ Rapid Application Development (RAD) \_\_\_ Rapid Prototyping  
\_\_\_ Joint Application Development (JAD) \_\_\_ Iterative Development  
\_\_\_ Segmented Development \_\_\_ Object oriented  
\_\_\_ Spiral

Other

**Project Management Factors** (continued)

21. Which individual, team, and organizational information systems development and management practices will be implemented on this project? (check all that apply)

\_\_\_ Project Planning \_\_\_ Requirements Management  
\_\_\_ Configuration Management \_\_\_ Project Tracking and Oversight  
\_\_\_ Quality Assurance \_\_\_ Sub-Contractor Management  
\_\_\_ Risk Assessment \_\_\_ Peer Reviews

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<sup>1</sup> For additional information, visit the SEI web site at <http://www.sei.cmu.edu>

☐ Training Program                      ☐ Software Product Engineering  
☐ Intergroup Coordination           ☐ Integrated Software Management  
☐ Organizational Process Definition   ☐ Organizational Process Focus  
☐ Defect Tracking

Other

**22.**      What training do you anticipate using to complete this project? (check all that apply)

☐ Individual      ☐ Classroom              ☐ Self Study              ☐ CD Rom  
☐ Video Tape      ☐ I-TV                      ☐ Computer Based Training (CBT)

Other

**23.**      Which medium will be used for the project/system documentation? (check all that apply)

☐ Web Site      ☐ Hardcopy      ☐ CD Rom      ☐ Online Help  
☐ Video              ☐ Quick Reference Card                      ☐ Diskette

Other

**24.**      What measurements will be used to track this project? (check all that apply)

☐ Cost                      ☐ Schedule              ☐ Effort                      ☐ LOC  
☐ Defects                      ☐ Function Points

Other



**Questionnaire Completed by****Organization** \_\_\_\_\_**Date****Distribution List**

In general, the completed questionnaire should be sent to all immediate and extended project team members who will participate in project phase exits or major checkpoints. Please refer to the Systems Development Lifecycle (SDLC), Appendix E, Phase Exit Process Guide, Examples 2, 3, 4, and 5, for guidance on preparing a distribution list.

**Optional**

A peer review, e.g., conducted by someone who has been involved with a similar project, can provide helpful insight and help improve the quality of the questionnaire and the project. Has an independent peer review been conducted on this completed questionnaire?

\_\_\_\_ Yes                      \_\_\_\_ No

If Yes, conducted by:

**Name** \_\_\_\_\_ **Date** \_\_\_\_\_

**Name** \_\_\_\_\_ **Date** \_\_\_\_\_